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ABSTRACT

An advisory system is a simple method that ensures that no secondary school student becomes anonymous. Using staff as advisors guarantees that each student has an advocate; this provides students with an ongoing relationship to a mature professional who promotes their best interest. This book outlines how to investigate and establish an advisory system that is tailored to the needs of a particular school. Topics covered include: defining an advisory system; setting up the advisory system; training staff; determining the role of an advisory committee; choosing place and time for meeting; keeping records; placing students; achieving a reasonable advisor-student ratio; outlining a professional advisor-student relationship; and communicating with parents. The book also covers: examining the role of guidance counselors; helping students select courses; and determining an advisor's role in student discipline. An appendix lists related publications and contact schools. (MKA)

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MARK F. GOLDBERG

# How to DESIGN AN ADVISORY SYSTEM FOR A SECONDARY SCHOOL

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# Acknowledgments

I want to thank the small group of teachers who helped me found Shoreham-Wading River (SWR) High School in Shoreham, New York, in 1973. They agreed to try an advisory system, which we called House Group, on the strength of my arguments for it and on my assurance that it was working in the middle school in SWR. To the best of our knowledge, we were the only high school on Long Island organized around this system at that time.

Richard Doremus, who became superintendent of schools in SWR in 1973, and Dennis Littky, who had started the middle school in the district two years earlier, provided enormous help. Dick gave great wisdom and continuous support, and Dennis supplied the guidance and enthusiasm that bolstered the advisory effort that first year.

I would also like to thank the five people who were kind enough to read the manuscript of this book before I submitted it. Each made suggestions that were incorporated into the text.

My wife, Sandra, read with the eye of a 1st grade teacher who had never been involved in an advisory system but had heard about it for more than two decades. She was the informed outsider.

Joseph Hayward is principal of SWR High School, and Kevin Mann is an experienced social studies teacher in the school. Joe has been principal for five years and has had a House Group for each of those years. Kevin was a student teacher the year SWR High School started; he has been a House Group teacher and frequently a member of the House Group Committee over the past 25 years.

Ross Burkhardt, a social studies teacher, is an original member of the SWR Middle School staff and has been an advisor for all his years in SWR. He is currently national president of the Middle Schools Association and a strong advocate for advisory systems.

Elaine Boyrer taught science in SWR High School for many years and experienced the advisory process there as a House Group teacher. She is now the principal of North Shore High School on Long Island, which has an adaptation of an advisory system called Commons.

Margaret Oosterman was all one could wish for in an editor: intelligent, insightful, accurate, and pleasant.

# Introduction

I became aware of an advisory system in the late 1960s and early 1970s. At that time, the National Association of Secondary School Principals Model Schools Project was promoting personalization in schools. The project director, J. Lloyd Trump, spoke and wrote about an advisory system that would guarantee each student a staff advisor-advocate in school. When I visited a school in Northern Virginia that was part of the Trump effort, I was impressed by its modified advisory system and determined that I would bring such a system to a secondary school if I ever had the opportunity.

The period 1966 to 1974 was a time in U.S. history and culture when many young people were rejecting adult values, largely over the war raging in Vietnam. Everything seemed to be changing, from music and dress, to basic understandings about what the United States stood for. A drug and anti-establishment movement developed among many young people. Erik Erikson published *Identity: Youth and Crisis* in 1968, and books and articles followed with the words *youth*, *teenager* and *crisis*, or *depression* in their titles. I well understood that any effort to increase personalization in schools would help alleviate some of what young people were experiencing.

In 1973, I became the founding administrator of the high school in Shoreham-Wading River (SWR) on Long Island in New York. Richard Doremus had just been appointed superintendent of schools, and he was interested in establishing "guidance units" in the new high school, a concept close to an advisory system. Dennis Littky, the founding administrator of the new middle school in SWR, had installed a rather complete

advisory system there a year before I arrived in SWR. I knew Dick Doremus and had worked with Dennis Littky for two years at the State University of New York at Stony Brook. They made it easy for me to bring an advisory system (called House Group) to the new high school.

I was able to build on and copy Dennis's excellent work, and Dick understood and supported the system and was interested in how the advisory House Group system could become even better. Dennis left SWR after six years, but the advisory system remains as part of his strong legacy. I stayed in the high school for 21 years, until June 1994, and the House Group system remains. Shoreham-Wading River has gone through many changes recently, including considerable financial adversity, yet both the advisory system and the House Group system appear to be part of the permanent landscape of the school district.

An advisory system will appeal to any middle, junior high, or high school that wishes to emphasize personalization. Most graduates of U.S. public schools recall homeroom, a place where 20 to 30 youngsters reported in the morning for attendance and notices. An advisory system is different: It stresses a relationship between an advisor and student that does not exist in homeroom.

Advisory meetings are smaller than homeroom meetings, and an advisor may play a role in any aspect of a student's life, from scheduling to discipline, from common school problems to more complicated issues that require a helpful adult and meetings with the student's parents or guardians. The individual relationship between an advisor and student is the heart of an advisory meeting and sets it apart from a homeroom setting.

This book provides a comprehensive look at how to investigate and establish an advisory system. All schools have different needs, and some schools will be able to devote more time to this process than others. Therefore, I have tried to provide options and to focus on realistic school possibilities educators can select from to tailor such a system for particular schools. So as you read this information, think about how an advisory system can work in your school and which elements described here fit best with your specific circumstances.

# 1 Getting Started

## What Is an Advisory System?

An advisory system is a simple method that ensures that no secondary school (middle school, junior high school, or high school) student becomes anonymous. In most elementary schools, students spend the better part of their day with one teacher. That person gets to know the students extremely well, and usually gets to know the students' parents fairly well, too. In this type of setting, the art or physical education teacher naturally tells the 2nd grade teacher about an unusual incident in her class. When a 2nd grader misbehaves on the playground or wins a music award, the regular classroom teacher is informed. In secondary schools, most students have 4 to 8 teachers each day. Guidance counselors typically have 125 to 350 students assigned to them and little sustained contact with most students.

In an advisory system, the goal is to have one adult in a secondary school who sees each student every day during a time similar to a traditional homeroom time. The adult is also that student's advisor—an element that differentiates advisory time from homeroom time. Such issues as the role of the guidance counselor and the method by which a reasonable ratio of students to staff can be achieved are addressed in later chapters. For now, what's important is that an advisory system guarantees certain benefits to students in a secondary school:

- Each student is known well by one staff member.
- The staff member receives all important information on the student.

- The staff member knows the student's parents or guardians.
- Each student has one advocate in the school.

No student can get lost because she is quiet, or he doesn't stand out in any obvious way—or because no particular adult thinks having a strong relationship with a student is her responsibility. All secondary schools need an advisory system, and the larger the school, the greater the need.

Throughout this book, I describe advisors' major responsibilities, outlined in the following list. Items can be added; eliminated; or limited to four, six, or eight in a particular school. A precise list depends on the time available and the nature of a school. In general, here is what advisors do:

- Meet with their advisory group (about 14 students) for 10 minutes each morning.
- Meet individually with advisees 4 to 10 times each school year.
- Play an important role in advisees' annual course selection.
- Are available to advisees when they have a pressing issue or crisis.
- Gather information on advisees informally and formally.
- Meet with advisees' parents or guardians during a school year.
- Meet with staff members (teachers, counselors, social worker, aides, and assistant principal) as needed.
- Look up guidance records when necessary.
- Make and return phone calls to parents and guardians.
- Are advisees' advocate in discipline matters.
- Keep records on advisees.

## How Does a School Start an Advisory System?

School staff should not rush into implementing an advisory system without first researching it. The principal and a few teachers should visit one or two nearby schools that use such a system. State education departments should know which schools in a given area are using advisory systems.

I recommend that at least six or seven people go on the visit and that the group include a cross-section of the staff: union or teachers' association representative, guidance counselor, administrator, and teachers from two or three subject areas or some other representative group. Some schools have also included two or three students in the group. This fact-finding committee, or at least several members of this committee, can later serve on the Advisory Committee (discussed later in the chapter). The interest and visit should be shared with the entire faculty, who also need assurance that everyone will be kept informed.

Many schools invite teachers and administrators experienced in advisory work to visit their sites. Before the visit, educators from the school interested in implementing an advisory system can give the visitors a list of questions they would like answered. The questions should focus on what obstacles the school may encounter and what staff will actually do if the school adopts an advisory system.

After gathering information, the staff should devote several faculty meetings to this topic before deciding to adopt an advisory system. These discussions need to be realistic. An advisory system has many variations, so an inability to do everything recommended should not be a reason to give up altogether. Also, 100 percent of a school's staff may not vote to adopt such a system. If 60 percent are willing to try a variation that meets a school's needs and contract, I recommend going forward with the program. By the end of the first year, at least 70 percent of the staff will probably say this is an excellent system. Few educational programs receive more than a 65 to 70 percent vote of confidence, and schools would be stymied if they waited for 80 or 90 percent of the staff to say yes. Teachers and other staff members are professionals and will do advisory work well even if they do not wholeheartedly agree with each detail in a program—provided, again, that a strong majority supports the concept of an advisory system.

## What Training Is Needed to Begin and Support an Advisory System?

Training is crucial if an advisory system is to succeed. This section explains the main areas where advisors need training, which can take place at faculty meetings, on a curriculum workshop day when students

are not present, after early dismissal, or during paid workshop time outside of school hours—whatever method is realistic in a school's district.

## Thorough Discussion of Expectations

Because different schools make different plans and agreements, all expectations must be explicit. For instance, advisors need to know how often they are expected to meet with individual students, how they should gather or be given information on students, how often they should meet with (or phone) parents, and what role they should play in discipline, scheduling, or other aspects of a student's life.

Expectations must be realistic and thoroughly understood by advisors. Many advisors choose to go beyond the base expectations, but no pressure should be exerted on any advisor to do more than what's expected.

I cannot emphasize enough that the plan for advisory work should always be the result of thoughtful staff discussion. The final plan, approved by administrators and a majority of the faculty, will likely be drawn up by a committee dominated by teachers. And such a plan will probably reflect the needs, culture, and teachers' contract in a school or district. An advisory system usually fits the parameters of most teacher contracts. However, just as the late union leader Albert Shanker predicted, many teacher groups will work out special arrangements, if needed, if they see the value for students and if the special dispensation does not represent a serious breach of their contract. Shanker believed, correctly, that teachers favor responsible change and will work with boards of education and administrators to provide special or creative circumstances for programs they consider important.

## Understanding Advisory Forms

Advisory forms provide information for all staff to help students. An explanation of each form should be clear enough that advisors can answer the following questions: What is the form's purpose? How does a staff member complete the form? What does an advisor do with the completed form?

Most advisory forms are simple to understand and complete. The complexity is in what advisors are expected to write and what receivers

of the forms are expected to do. This work requires some conversation at training sessions.

A committee or individual teachers often create forms that serve particular needs. The forms should be short, undemanding, and designed to save time and increase communication. School personnel can use the Form for Giving an Advisor Information (Figure 1.1) to provide information to advisors about specific students. Advisors can use the Telephone Contact Form for an Advisor (see Figure 1.2 on p. 6) to keep track of phone conversations with parents and guardians.

## How to Gather Information

Information gathering is a process advisors use with the entire school faculty to gather information about students before parent meetings (see Chapter 5 for a thorough discussion). Information gathering must be

FIGURE 1.1

**Form for Giving an Advisor Information**

**Who Completes and Uses Form:** Any school employee
**When and Why:** Anytime; To give an advisor information about a student

Name of Advisor _____ Date _____

Name of Student _____

Name of Person Completing the Form _____

Information for Advisor

_____

_____

_____

_____

_____

See Me Urgent ____ Soon ____ Not Necessary ____

FIGURE 1.2

**Telephone Contact Form for an Advisor**

**Who Completes and Uses Form:** Advisor
**When and Why:** After each call of substance to a parent or guardian; To record highlights of the conversation

Name of Advisor _____ Date of Call _____

Name of Student _____

Person(s) Contacted _____ _____

Relation to Student _____

Reason for Call _____

Summary of Conversation

_____

_____

_____

Follow-Up Notes

_____

_____

_____

Additional People Consulted

_____ _____ _____

Notes

_____

_____

practiced. Pairs of teachers can role-play to see the kinds of questions they need to ask and the time they need to gather the information.

## How to Use Time with Advisory Groups and Advisor-Advisee Meetings

Learning how to use time efficiently is another opportunity to role-play, and students can be involved. Such training is important, even

with teachers and administrators who have been around kids for many years. I have heard excellent teachers say, "I run out of stuff 10 minutes into the meeting with a student" or "What do I do when the students just give short answers and there seems nowhere to go?" To help advisors in these areas, a few advisors can create materials, settings, and examples that the faculty can use. Many schools plan required staff meetings to help advisors prepare for such issues. For example, one staff meeting may focus on the first advisor-advisee meeting, four meetings may be used to discuss grade reports, and one or two may address scheduling meetings. An advisor may only need to arrange one or two unstructured meetings. Possible topics and questions to stimulate helpful discussions can be prepared ahead of time.

Many advisors allow an advisee to bring one friend to an advisor-advisee meeting. This person can be a best friend, a romantic friend, or another student in the same advisory group. Every meeting will not be conducted with a friend, but some advisors find this addition a good alternative to the usual meetings, and one that provokes conversation.

## Practice in Student Advocacy

Most schools agree that advisors should not play a primary role in discipline, although some middle schools favor a higher degree of involvement than most high schools. Minimal involvement in discipline means that an advisor can be a student's advocate. An advisor's role is to figure out with a student how to handle a bad situation at a time when the student may not be thinking clearly. Such involvement does not mean that an advisor always says a student is guiltless or tells a student how to feel about what happened. Once again, role playing helps advisors and is an activity students generally enjoy being part of.

## Speaking with Parents

Most staff members have been speaking to parents for years, so they can build on their expertise. But they have been speaking as content teachers or administrators, not as advisors. Advisors may discuss with parents summaries of their youngster's school experience, a discipline problem or pattern of problems, and possible college or career choices. Conversations may be in-person or over the telephone. It is important to get a sense for the time involved, the tenor of conversations, and the lim-

its of conversations. When discussing possible college choices with parents (or students, for that matter), advisors are not usurping a guidance counselor's role. Rather, they are preparing the student and family for a more focused conversation with the counselor, who is the real expert in this area. (See Chapter 5 for more information on contact with parents).

The Advisory Committee's responsibilities include providing training for advisors on speaking to parents. Advisors need some practice in finding the appropriate topics to discuss and the types of questions they should answer or refer to someone else, such as a guidance counselor, administrator, or other staff member.

### Yearly Training and Review

Any school with an advisory system needs to set aside a few faculty meetings, part of a conference day, or some other time yearly to review the system, reinforce practices, and consider issues and problems that have surfaced during the year. The system is so human that it will never be perfect, and review and modification will always be needed.

## What Is the Role of the Advisory Committee?

Initially, an informal committee is set up to investigate an advisory system. This group or one that draws from this group may become the permanent Advisory Committee. The committee is permanent; its members change.

### Composition

The Advisory Committee should have five to seven members, including a guidance counselor, an administrator, teachers from at least three different areas (e.g., math-science, humanities, and physical education), a member of the teachers' association—perhaps the building representative—and one advisor who is not a member of a school's professional staff (e.g., a school aide), if a school has such staff. A guidance counselor or subject area teacher, not an administrator, is typically the best choice to chair this committee. From the beginning, an advisory system should be perceived as largely a teacher-based system. Thus, a committee may have a guidance counselor, an assistant principal, a math teacher who is also the building representative, an English teacher,

a home economics teacher, and the school nurse. The guidance counselor or English teacher may be the chairperson.

## Meetings

The Advisory Committee does not need to meet frequently; five or six meetings a year are fine. These meetings have specific purposes:

- Determine how to poll the staff to find out the problems or issues that advisors want to discuss at faculty meetings or receive more training in. Interest polls are usually conducted once or twice a year so that the committee can learn the two or three issues that concern advisors the most. No staff can address 10 or 15 issues, so polling the staff and letting them know that the two or three most chosen issues will be on a faculty meeting agenda is important. A simple form that does not exceed one page can be used. The Poll for Advisory Issues (see Figure 1.5 on p. 10) is an example.
- Plan the faculty meeting that will address the result of an interest poll. What the staff wants usually becomes quickly apparent. If not, the committee decides what issues to discuss. The committee does not need to agonize here. They can't cover everything, so if four or five areas are in a virtual tie, members must quickly use their own best judgment to reduce the number.

Planning an effective meeting is important. Does a whole-group discussion followed by small groups work best? Before the faculty meeting, should a committee be formed to revise a particular form that staff indicated was a problem?

- Determine if there are any emergent issues the Advisory Committee needs to discuss, take to the administration, or bring to staff. Occasionally, the committee places an item on a faculty meeting agenda that did not emerge from an interest poll.
- Reach a consensus on what must be done next at the end of each Advisory Committee meeting or faculty meeting. To prepare for the faculty meeting that addresses the interest poll, the Advisory Committee should discuss the range of possibilities that may be discussed. The committee wants to build a reputation for holding practical and focused meetings that lead to conclusions and action.

Form 1.3

## Poll for Advisory Issues

**Who Completes Form:** All staff
**When and Why:** Once or twice a year; To poll the staff on issues related to the school's advisory system
**Who Uses Form:** Advisory Committee

Advisory time has been granted at the faculty meeting on _____. Please complete the following form and return it to any member of the Advisory Committee (listed below) by_____. The committee will meet on _____ to determine which two items most of you would like placed on the agenda for the meeting.

Committee Members: _____ _____ _____
_____ _____ _____ _____

*Instructions:* Check two areas that interest you the most. If you have other concerns, feel free to add them. Also, feel free to speak with colleagues to interest them in checking the same areas you check or add.

1. Using specialists (e.g., counselor, social worker, psychologist, or nurse) and administrators _____
2. Discussing the areas where I may be uncomfortable, such as when to contact parents, what's confidential, and when to contact an administrator _____
3. Using the advisory group morning meeting effectively _____
4. Better defining my role in disciplining advisees _____
5. Defining expectations: How much time am I expected to devote to advisory work? _____
6. Scheduling advisory time _____
7. Notifying teachers about advisees: Can we do it better? When should we write reports? _____
8. Meeting with parents _____
9. Gathering information _____
10. Ensuring fairness of advisory placements _____
11. Keeping records _____
12. Other concerns or comments _____

_____
_____

*Instructions:* Please choose one area you have identified and indicate how you would like it handled at the faculty meeting.
Area number or description: _____

- ☐ Use a whole-group discussion limited to 20 minutes.
- ☐ Use small-group discussions.
- ☐ Bring in an expert, or ask some advisors to prepare information.
- ☐ Other method: (please describe)

_____
_____

## The School Administration

By virtue of its composition, the Advisory Committee is powerful. If the principal is not on the committee, the committee or several members should meet with that administrator within a few days of each committee meeting. It's important that Advisory Committee work be understood and supported by the principal. Meeting with a steering group or site-based management group that plays an important role in a school is also recommended.

Guidelines for possible action or methods of communication help keep the number of time-consuming meetings to a minimum. Should a special meeting be scheduled to discuss spending $500 for a requested workshop? Perhaps the Advisory Committee has a budget for such items as consultants or supplies, and a meeting is not required to see if these can be provided. Perhaps advisory work can always have a three-hour meeting block on the annual parent conference day or a day when students are not in session but the staff works on school issues.

## Rotating Membership

It's a good idea to set term limits or to make a rule that at least one member rotates off the committee each year so that over several years, many staff members can serve on this committee. To maintain continuity on the committee, the turnover should not exceed more than two members annually.

# 2 Nuts and Bolts

## Where Is the Space for Advisory Meetings?

The easiest and most effective way to start a school day is with advisory group meetings, or advisories, as they are commonly called. When an advisory system uses most of the available adults in a building, finding space for all the meetings may be a problem. Flexibility and creativity are needed.

First, a word about why advisories should meet early in the morning. Most advisors agree that seeing their advisees, even for only 10 minutes in the morning and even in a group of 14, is important. That time provides an opportunity for advisors to go over issues and to intervene in any helpful way with students if needed. "John, did you do some of the work for science this weekend? Let me know if I can help you figure out some more ways of catching up." Even more important, that time gives advisors a chance to notice things—and possibly do something about them. For example, advisors may wish to compliment a student on a new backpack. An advisor may notice that a student seems angry or depressed. "Mary, please wait a minute when the bell rings. I'd like to ask you something."

Of course, housekeeping chores such as attendance and notices need to be dealt with, but the real job of advisors is to notice what's going on. An advisor may have uneventful morning advisories 10 or 12 days in a row, then notice something worth following up on. Catching a student early in the morning who is extremely upset and helping to defuse that anger may be one of the most important activities an advisor does that day.

When a school's advisories all meet at the same time, which is the most common format, the school often needs to use the cafeteria for two advisories, the auditorium for two advisories, a conference room or the library for one advisory, and so on. During planning for an advisory system, the Advisory Committee should walk through the school or look at a building plan to help figure out space needs. Some administrators use stack chairs so that they can hold advisories in their offices. Teachers may even allow an advisory to be held in the teachers' lounge. In schools where advisories are held in odd spaces, switching at midyear with someone in a better space is a good idea. Space may be tight, even difficult to find, but lack of space should not be an excuse for reducing the number of advisories. The relationship between an advisor and advisee is crucial. Obviously, space for two people to meet by appointment is far easier to find than space for an entire advisory, especially when all advisories are meeting at the same time. Schools need to look at every reasonable and possible safe space in the building.

## Where Is the Time in a School Day for Advisory Work?

Let's look at the schedule of a traditional school. The day begins in Trad High School at 8 a.m. and ends at 2:45 p.m. There are eight periods; most teachers have five classes, a lunch, a preparation period, and a duty assignment. All too often, the duty assignment is some sort of hall or cafeteria monitoring, an activity many teachers don't particularly like.

Working together, administrators and teachers can help determine the best way to fit advisory work into teachers' schedules. Answering the following questions may help. The relevancy of these questions varies from school to school, but all are worth contemplating.

- Are all the duty assignments necessary? Can teachers be assigned only one, two, or three days each week, say, to hall duty? Such allocation allows them to devote two, three, or four periods each week to advisory work.
- Can some teachers have four classes instead of five? These teachers can fill many of the duty assignments and still have time for advisory work. Perhaps it is possible for only 5 or 10 percent of the staff to

teach four classes instead of five, but any relief helps. The reduced class load can be rotated yearly, or maybe restricted to English teachers to give them more time to read compositions.

- Can some monitors, aides, or secretaries be hired to do some or all the duty assignments, thus relieving advisors to do advisory work?
- Can advisors meet with advisees while advisors are on hall duty? Often, the mere presence of a teacher or monitor in the halls is all that is required. Of course, the most sensitive issues cannot be discussed in the hall, and no student should select courses in the hall, but some meetings may be possible.

Ideally, teachers would be relieved of all duty assignments, particularly monitoring duties, giving them five periods each week for advisory work. Some schools are using this approach, with no violation of contract, but such efforts are not always possible. What is possible is to figure out ways to relieve teachers of two or three duties, which is a step toward implementing an advisory system.

- Can "rolling" times for advisory work be instituted? Let's say that Triad High has found a way to give each teacher three periods a week to perform advisory duties. Staff has agreed that these are three "rolling" times, that is, they are not the same times each week. For example, Mr. Jones has lunch each day at 5th period, prep time at 7th period, and three advisory periods at 3rd period on Monday, Tuesday, and Friday. The most effective way for Mr. Jones to get his work done is to regard these times as 13 unstructured periods each week during which he can determine when to have lunch, prepare materials, meet students, and do whatever else needs to be done. These rolling periods give Mr. Jones great flexibility in carrying out his responsibilities.

## What Records Should an Advisor Keep?

The number and types of records become a function of time and space, but there is a minimum. Advisors should start with at least one manila folder for each student, clearly labeled with the student's name. A file cabinet and a hanging file system work well for storage. As the years go by, advisors may wish to have three or four folders inside one hanging file to separate each student's basic information, report cards and other reports, parental contacts, discipline, and other areas.

Maintaining records helps advisors see patterns. The key is to keep the folders well organized and slim. Most advisors do not have a secretary, and filing may not be a strength. Advisors soon learn to save those items that they have good reason to believe they will want to refer to later. Each June, they should eliminate from the folders the short notes and odd things that were important several months ago but will not be needed next year.

Occasionally in this book, a form is referred to before or after it has been explained. For example, the four forms referred to in the remainder of this chapter are explained in later chapters. If readers wish to see the forms, a list of figures at the front of the book shows the page number for each form.

## Basic Information Forms

The Form for the First Advisor-Advisee Meeting (Figure 4.1, explained in Chapter 4) contains all the factual information advisors need about an advisee, as well as material they may wish to refer to from time to time. Many advisors add notes to the form or fill it in more completely as time goes by. In addition, advisors should complete the Form for a Regular Advisor-Advisee Meeting (Figure 4.2, explained in Chapter 4) for each individual meeting. These two forms allow an advisor to quickly remember John's circumstances, issues, and changes over time. Items get crossed out or added as a new sibling is born, parents separate or remarry, or John raises the idea of dropping out of school or trying for highly competitive colleges several times.

## Report Cards and Other Reports

Advisors should save report cards, transcripts, and interim reports they receive. Each school has its own routines for keeping these records. The school administration, guidance counselors, and individual teachers should send advisors copies of all information they produce. It is helpful at the beginning of a school year for each teacher to receive a roster listing all the advisors and their advisees. A school's printed report forms should have a space for an advisor's name, and all advisors should receive copies of the reports. Such a procedure soon becomes part of the culture of a school that adopts an advisory system.

## Information-Gathering Forms

If advisors gather information once or twice each year, and I know of no school that does this activity more than twice, advisors should save the forms used. Two forms for gathering information are the Standard Form for the Information-Gathering Process and the Short Form for the Information-Gathering Process (Figures 5.1 and 5.2, explained in Chapter 5). Such forms help advisors see patterns. Highlighting information quickly shows that John has a history of problems in math classes or that Mary has figured out how to keep track of homework by early in her second year in her advisory, and her advisor no longer needs to raise that issue with her.

## Parent Information

Some advisors make notes on the Standard Form for the Information-Gathering Process (Figure 5.1) when they meet with parents. This form lists the basic subject areas. Other advisors prefer to use a form that they have created to better serve their purposes. Both types of forms allow advisors to record the parents' perceptions on the two or three important issues that surfaced in a meeting.

## Information on Course Selection and Planning

Over time, forms and notes related to a student's program accumulate. Such records help build a history of how an advisor and advisee made choices and where a student is headed academically.

## Everything Else

School administrators and staff members sometimes create forms, and advisors typically receive all sorts of notes, such as a desperate note or form from a librarian asking for help with 12 books an advisee has never returned. Many of these items are worth filing for a short time; some are worth keeping for the year; few are needed 18 months later. "Everything else" threatens to make filing a part-time job, so advisors should not file or keep anything that they can possibly throw away after they've taken action. Again, advisors want to be tough at the end of each year and keep only what's crucial.

## Passing on the File

If an advisee moves to another advisory, the advisor should pass on that student's file to the next advisor. In fact, the Advisory Committee should make sure that a system for transferring files is in place. The advisor with the file should clean it out, taking out anything that is personal or may be misunderstood by another person. Passing on the facts and some notes is best. If a student's file is particularly complicated, the old and new advisor may want to meet to familiarize the new advisor with any special circumstances.

# 3 Placing Students

## How Are Students Placed in an Advisory Group?

Students are placed randomly in advisories twice: in the first year of middle school and in the first year of high school. The initial placement occurs most often in grade 6, typically the first year of middle school. The random placement is repeated in grade 9 or 10, whichever is the first year of high school. The random selection is done in the spring prior to movement to middle or high school, and the current teachers check the advisories to eliminate any extremely poor placements and to note any special cases.

Let's say advisory placement begins in a 6th grade that has 192 students. To develop a roster for random placement, all the students are listed alphabetically. Grade 6 has 12 staff members who will act as advisors for the entering students. Using 12 professionals for 192 students results in twelve 16-student advisories. To follow random placement, the first advisory is formed by selecting from the roster the 1st name, 16th name, 32nd name, and so on; the remaining advisories follow the same pattern. The roster is compiled; only changes to correct very lopsided boy-girl ratios are made. Then the roster is shown to the 5th grade teachers who are asked to do the following:

- Make the fewest changes possible.
- Make a switch when convinced that two students should not be together (e.g., families are hostile to each other or students have been in several fights with each other).

- Make a switch when convinced that two students should be together (e.g., strong and consistent evidence of synergy is evident).

As a rule of thumb, a group of 192 students would probably not need more than five to seven changes.

A roster like the one in Figure 3.1, Teacher Roster for Advisory Groups, is given to all advisors to show that no inequities exist—that every effort has been made both to achieve a fair boy-girl ratio and to keep the size of advisories reasonably constant. No names are placed in this first roster. Figure 3.1 lists seven advisories; that number varies, depending on the number of advisors available and the number of students who will be placed in advisories.

Figure 3.1

**Teacher Roster for Advisory Groups**

**Who Completes Roster:** Person compiling advisories, usually school support staff, with help from teachers

**When and Why:** Late in a school year; to give all advisors information on the size of advisories and boy-girl ratios

**Who Uses Roster:** Advisors

| Teacher for each Advisory Group | NUMBER OF STUDENTS IN AN ADVISORY GROUP | | |
|---|---|---|---|
| | Boys | Girls | Total |
| Teacher 1 | 9 | 6 | 15 |
| Teacher 2 | 8 | 8 | 16 |
| Teacher 3 | 10 | 7 | 17 |
| Teacher 4 | 8 | 8 | 16 |
| Teacher 5 | 8 | 8 | 16 |
| Teacher 6 | 6 | 9 | 15 |
| Teacher 7 | 7 | 9 | 16 |

At the end of the summer, a few days before school opens and students are about to enter their first middle school or high school grade, two more rosters should be produced.

- ***Roster 1.*** A list of advisories showing advisor and student names for each advisory. This roster allows school staff to see quickly the name of each advisor and the composition of an advisory.
- ***Roster 2.*** An alphabetical list of all students showing the name of the advisor across from each student's name. This roster allows school staff to locate quickly the name of a particular student's advisor.

Random placements usually work as well as any other technique in advisory placement. In some school districts, teachers who have students in the feeder schools prefer to make up the advisories because they like to see a balance of some sort. Even though such a method presents no particular harm, it wastes time because there is little evidence that teacher placement makes any difference. Again, what is primary should be the relationship between an advisor and advisee.

## How Does a School Achieve a Reasonable Ratio of Adults to Students in an Advisory Group?

It's simple. All the available professionals in the building, not just the "main" classroom teachers, participate. The art and physical education teachers, the principal and assistant principal, the librarian, and the guidance counselors take advisories. Involving the whole school means that professionals in the building start their day the same way, with the same experience. From the principal and the math teacher to the librarian and the art teacher, the common advisory experience extends to talking to each other in informal settings about kids, serving as a student's advocate in times of difficulty, gathering information from other staff members for a parent conference, and helping students with course selection.

Some professionals think they should be exempt from participating. For example, one teacher may say, "But I meet kids before class each morning, and I can't do this." The guidance counselor or principal may say, "The nature of my relationships with kids and parents won't allow

this." These types of pleas have two responses. Advisory systems have worked well in other schools; if a few crucial people opt out, the system will not work well. After a few months of getting used to the fact that the only business that goes on in the school from 7:45 to 7:55 a.m. is advisory business, the concerns evaporate, and staff members wonder how they could have started their day any differently.

To show how important 100 percent participation is, let's look at the numbers in an example. A high school has 43 teachers and 700 students, for an adult-student ratio of 1:16. Included is every full-time teacher—from English and science to music, art, and special education. Some classes have 29 students; others, such as an advanced class or a special education class, have 5 to 15 students.

The building has two administrators, two guidance counselors, and one librarian. Special area teachers who are shared with the middle school, a half-time psychologist, a nurse-teacher, and a dean are the remaining professionals. If every full-time professional is used and if one or two people who are in the building half-time or more are also used, about 51 people are available to serve as advisors. By using all the professionals, the ratio changes from 1:16 to 1:14.

Obviously, the lower the adult-student ratio, the more effective advisors can be. Any number under 20 is manageable; groups of 12 to 15 are ideal. In some schools, it is contractually possible to use other employees, such as school aides. They can be given smaller groups and be supervised by another professional who also has a small group. Some schools work out an arrangement with a four-fifths teacher to take a smaller advisory. What's important is to use every professional to make advisory a shared experience among the adults in a school.

## How Are Students Assigned to an Advisory Group After the First Year?

Let's use an example of a high school having grades 9 through 12. It is early May, and James is about to complete 10th grade. Each year students pick an advisor for the next year. The guidelines are simple:

• ***Teachers move up a grade—as advisors, not as teachers—each year.*** Most faculties agree that such movement is a good idea but not absolutely necessary. It allows advisors to move with their advisory

students and maintain a continuing relationship. Advisors get to know the students and their families even better. Each student has a relationship of trust and understanding with an advisor, and as a result, assignments become easy.

If a teacher insists on changing grades, thus not staying with the same advisory group, the request should not be resisted too much. The Advisory Committee should encourage the advisor to reconsider, given the many benefits of continuation, but some teachers strongly prefer working with younger or older students. Sometimes an advisor feels that two years with a particular advisory is enough. The advisor should be encouraged to speak to advisees about the change, which can be done when the students make their choices for the coming year.

• ***Students are given a choice form listing all available advisors for the next year.*** The day before choosing an advisor, James is given a choice form listing the advisors, so that he has time to think about what he wants to do. If he wants his current advisor, the assignment is guaranteed. If he wishes to make a change, he is guaranteed one of the choices he indicates on the form. This method allows students to eliminate teachers they do not wish to have as an advisor or they know little about. A choice form is shown in Figure 3.2, Student Form for Choosing an Advisor.

• ***Students complete the choice form.*** During morning advisory the next day, James completes the choice form. He can check a number of names or list his choices in order of preference. Students need to understand that only individual choice forms are honored (no oral requests can be made in advisory) and that some advisors may be unavailable. The number of choices students have depends on the size of an advisor pool. Students should be allowed to select about one-third the number of advisors or five, whichever is higher. The person making the assignments needs some flexibility because many students choose to stay with their current advisor, thereby eliminating openings; some advisors draw many students; and others draw few students. Most schools have new students each year, and some students leave the school. Teachers also leave, and new teachers are hired. These types of changes give the assigning person a little extra flexibility. The forms are collected in advisory and may be put in envelopes to ensure student privacy.

When an advisor draws few students, several interventions or solutions can be used to fill the advisory.

Form 3.2

## Student Form for Choosing an Advisor

**Who Completes Form:** Student
**When and Why:** During a designated morning advisory meeting; To choose an advisor for the next year
**Who Uses Form:** Person compiling advisories

Name of Student _____ Date _____

Name of Current Advisor _____

*Instructions:* Choose 5* staff members from the list of 10* below that you feel you could enjoy as an advisor next year. Number your choices from 1 to 5, with 1 being your first choice. You are guaranteed one of your five choices, but you may not get one of your higher choices. You will get your first choice if that person is currently your advisor.

**Staff Members Who Will Be Advisors Next Year**

Mr. Jones ___ Ms. Wilson ___ Mr. Perry ___ Ms. Carter ___ Mr. Clinton ___

Ms. Green ___ Mr. Gore ___ Ms. Allen ___ Mr. Smith ___ Ms. Bush ___

* Number will vary, depending on size of advisory pool.
*Note:* To help with record keeping, many schools attach an ID number to each advisor, using a computer program.

- New students to the school can be assigned to that advisor.
- Students who did not get one of their top three choices can be asked if they would like to go to this advisory. Caution is needed, however, when approaching students with this request because word may get around and embarrass the advisor.
- At least for one year, this advisory can be smaller than most of the others.
- The Advisory Committee or an administrator can offer the advisor advice, collegial discussion, support, and other forms of help related to the problem. Such help becomes especially important if an advisor

draws few requests two or three years in a row. The committee's efforts should be positive and collegial.

## What Happens When a Student Asks for a Different Advisor During a School Year?

Fortunately, students rarely ask for a new advisor during the school year, but it does happen. There are ways to head this request off and ways to handle it when it happens. Schools should have a policy about change. Here is one that works well:

- Students are expected to stay in the same advisory for at least one full year.
- On rare occasions when an advisory needs to be changed during the year, the student should make an appointment to see the person designated to handle such requests. Perhaps one teacher, one guidance counselor, and one administrator can take turns serving each year. That person listens to the student and any other players (e.g., parent, advisor, and other teachers) and makes a recommendation.
- Changes should not be made to accommodate friendships or romances; otherwise, dozens of changes will have to be handled each year. The designated person must be convinced that the "chemistry" between the student and advisor is truly bad. A student who is cutting classes and has an advisor who is strict on this matter should not be changed. A student who says, "I just can't talk to him. I'm really uncomfortable, and I've tried now for two months," may need to be changed if the advisor agrees they have had some difficulty connecting. Advisors should be consulted before a change is made, and students should be required to wait two weeks to see if they still want the change.

Advisors usually accept whatever students they get, just as teachers accept whatever students choose them or are assigned to their classes. In rare cases, an advisor may say, "I cannot work with this student." Clearly, this is a delicate matter, but an administrator, designated Advisory Committee member, or committee set up to deal with student change should take this type of comment seriously. I have gone several years without seeing a teacher request to remove a student from an advisory.

If an advisor insists, the request should be honored if possible. The good news is that many schools with a long history of using advisories report that they rarely have requests for change from students or advisors.

## What Is a Mature, Professional Relationship Between an Advisor and a Student?

This question vexes many advisors, particularly at the beginning of their advisory experience. Advisors want to be as helpful as possible, yet need to draw a line between adult-professional and friend—a line not always easy to draw or see. An advisor may have many somewhat confidential discussions with a student. For example, a student may admit that she can't stand a certain teacher; the advisor needs to help the student figure out how to get along with the teacher. A student may say that he hates a particular subject; the advisor needs to help the student figure out how to do good work in the subject.

Obviously, falling into a trap of becoming the student's "adult-peer" is dangerous. When Mary says, "Yeah, lots of students think Mr. Jones is a jerk. I think he's a jerk, too," her advisor's job is to help Mary work through the problem in a mature manner. Mr. Jones is the French teacher. Although Mary doesn't like Mr. Jones or French, she does want a sequence in foreign language. The task for Mary is to figure out how to work with Mr. Jones, learn some French, and get a decent grade.

If the problem is serious, the advisor may speak professionally and confidentially to Mr. Jones. The advisor would certainly not say that Mary thinks Mr. Jones is a jerk, but the advisor would indicate that Mary is having a difficult time in class. What would Mr. Jones recommend? Should the three of them get together? The solution is not easy. It's far easier to talk to a student about whether she prefers French, Spanish, or German or whether she is too extended to add the literary magazine to her other three cocurricular activities.

An advisor must always remain a mature staff member, albeit a somewhat friendlier one than most. This balance is the fine line that advisors must constantly observe. Pandering to a student, becoming a virtual peer, or telling a student he was right when he was wrong does not help in the long run. An advisor can have a frank discussion with a student about a foolish prank or a rude remark and still be the student's advocate when

the punishment is meted out. An advisor can ask the dean or administrator to consider that a student rarely gets in trouble or is contrite—and suggest punishments. But it is not an advisor's job to seek a free ride for a student who needs to know that consequences are a part of life.

Concerns about the relationship between advisors and students are part of the ongoing staff review of any advisory system. I have never met an advisor who knew precisely how to behave with each student under all circumstances.

## Should a Student Have Close Relationships with Other School Adults?

Of course. Advisory is not intended to block or in any way impede other relationships between students and helping adults. Students have parents and other relatives, therapists, coaches, theater directors, math and English teachers, music teachers in and outside school, and many other adults in their lives with whom they may want a close and mature relationship.

Parents should also feel free to see another staff member if they wish. A parent should notify the advisor as a courtesy and may even wish to arrange the meeting through the advisor and ask the advisor to be present. Whenever a meeting is scheduled with another professional, a student's advisor should receive notice of the meeting.

Again, an advisory system assures everyone that each student is well known to at least one school adult, that the student always has an advocate, and that someone is collecting a rounded portfolio of that student. Advisors should expect that students will have other strong connections to adults. Such relationships are good and healthy.

# 4 Meetings with Students

## What Does an Advisor Do in the First Meeting with an Advisee?

The first meeting between an advisor and advisee is always an individual meeting; its purpose is to allow an advisor and advisee to get to know each other. Some staff members are more comfortable than others with this meeting. For people who are somewhat uncomfortable or who want structure, a form that can be adapted to fit the needs of a particular school may help. The Form for the First Advisor-Advisee Meeting (see Figure 4.1 on p. 28) is an example of one that provides an "agenda," yet allows plenty of room for spontaneous conversation. An advisor needs to decide whether to complete the entire form or part of it during the meeting, or to ask the advisee to complete the form. What's important is that the first meeting go well and include a good exchange of information—with an advisee mostly informing an advisor.

At this initial meeting, an advisor should tell a student whatever the advisor is comfortable saying about herself. I want to emphasize that this relationship is always completely professional, yet has a degree of warmth typically found in a relationship between an elementary teacher and his students. An advisor is not encouraged to tell a student the most personal and pressing issues going on in her life, but may talk about where she went to college or what grades her own children are in. Many advisors discuss their schedule and a student's schedule to get a first picture of how an advisee feels about classes and to determine the best times for future meetings.

FIGURE 4.1

**Form for the First Advisor-Advisee Meeting**

**Who Completes Form:** Advisor or advisee
**When and Why:** During the first individual meeting with an advisee; to help reduce awkwardness and give the advisor information
**Who Uses Form:** Advisor

Name of Advisor _____ Date _____ Time _____

Name of Student _____

Address _____

Phone _____ Date of Birth _____ Birthplace _____

Previous Advisor _____

Other Schools Attended

_____

_____

Parent/Guardian Names and Home Phone If Different from Advisee's

_____

Father's Work Phone _____ Place of Work _____
Mother's Work Phone _____ Place of Work _____
Guardian's Work Phone _____ Place of Work _____

Siblings _____ _____

_____ _____

_____ _____

Special Interests

_____

_____

Student Concerns

_____

_____

(Figure continues on the following page.)

(continued)

Strongest Subject _____ Weakest Subject _____

Other Activities (e.g., sports, clubs, and hobbies)

_____

Goals for the Year

_____

_____

One Thing You Would Like Me to Do

_____

_____

One Thing You Would Like Me Not to Do

_____

_____

Do You Have a Part-Time Job? Where? What Do You Do?

_____

_____

Other Comments

_____

_____

_____

This meeting is an advisor's opportunity to tell a student that the advisor is the student's advocate and the person the student can come to for information. If a student wants to talk about a class in which he's having difficulty or about a student he's having problems with, his advisor is the right person to seek out. If a student wants to talk about what classes to take for next year or how to get some needed information for a class—and isn't sure whom to ask—her advisor is the person to talk to. An advisor does not need to have all the answers, only a willingness to respond. An advisor may walk down to the library with a student and offer to look something up, help a student figure out how to approach a classroom teacher, or speak to a guidance counselor, administrator, or the school psychologist if the advisor feels he is getting in over his head.

## What Does an Advisor Do in Subsequent Advisor-Advisee Meetings?

Meetings can be held between an advisor and advisee for hundreds of reasons, but unfortunately, only a limited amount of time exists. This section describes several types of meetings that typically occur with some frequency. Some of the meetings occur within days or weeks of each other and may be combined if the topic is not urgent. Perhaps report card distribution and information gathering to prepare for a parent conference are within a week or 10 days of each other. Rather than schedule two meetings in close proximity, I suggest combining a meeting to discuss these two important forms of information. As often as possible, an advisor should complete the Form for a Regular Advisor-Advisee Meeting (Figure 4.2) for each meeting.

### Report Card Meetings

A good time to meet with advisees and review classes is after reports cards have been issued. Talking about an actual grade in a particular subject may not be as productive as asking if a student enjoys this subject, enjoys this teacher's style of running a class, plans to continue with this subject in future years, or has considered the related courses offered. The grade certainly comes up, and as time goes by, a student and advisor will have increasingly fuller contexts in which to discuss achievement in the subject. The focus should be on what subject, style, or level of work best suits a particular student, not on whether a teacher is "good" or "bad."

Many schools issue report cards four times a year but schedule only three advisor-advisee meetings to discuss report cards because of the difficulty in scheduling a meeting at the end of a school year. Some schools issue interim reports or have three reporting periods. Report card content varies, from numbers to letter grades to narrative to phrases to a combination of the preceding—and meetings must be adapted to address a particular school's reporting format. Meeting with each student after each report card may not be possible, so an advisor may want to rotate meetings or determine which three or four students to see about reports.

Form 4.2

**Form for a Regular Advisor–Advisee Meeting**

**Who Completes and Uses Form:** Advisor
**When and Why:** During and after an individual meeting with an advisee; To record highlights of the meeting

Name of Advisor _____ Date _____ Meeting Number _____

Name of Student _____

Subject of Meeting _____

_____

Notes

_____

_____

_____

_____

_____

To Do

_____

_____

_____

Referrals

_____

_____

_____

Results

_____

_____

_____

## Course Selection Meetings

This is one of the most important, enjoyable, and necessary meetings an advisor has with advisees. See Chapter 6 for an in-depth explanation of this type of meeting.

## Urgent Meetings

When a student has an urgent issue or crisis, the student's advisor and student should meet as soon as possible. Most advisors try to arrange mutually convenient meeting times. When such times are not available, the advisor has a choice: Meet before or after school if both can meet then, or take the student out of class. When the student is taken out of class, the advisor must make sure the student is not missing a test or exhibition. Some schools have a form that a teacher signs to verify that no test or exhibition will occur that day and to give the student permission to miss one class. The advisor should keep track in the student's folder of the class missed, so that the student is not taken from the same class twice.

Either an advisor or advisee may request urgent meetings, which vary in length and degree of urgency. An advisor may need to see a student in the next day or two to talk about a major project the student is having great difficulty with, as reported by the science teacher. The science teacher has been working with the student—and will continue to—but would like the advisor's support because the project is large and the student has been uncharacteristically remiss in getting preliminary work in. A student or advisor may need to meet on a specific day to discuss a serious issue coming up with a coach or theater director right after school. Meetings related to disciplinary issues should not wait.

Many meetings with advisees take all or most of a class period. Urgent meetings may only take 5 or 10 minutes, or they may consume much of an advisor's unstructured time in a day.

## Topical Meetings

Topical meetings are usually scheduled and take less than 15 minutes. For example, Jim's advisor knows that Jim is especially nervous about making a major presentation in a class on Thursday. Jim has been in her advisory for over two years. (In many schools, advisors and advisees stay together for two or more years.) They agree to meet for 10 minutes on Wednesday afternoon to talk about the big event. The advisor wants to encourage Jim, and Jim would like to try out a couple of questions on the advisor about some last-minute things he may prepare that evening.

## Interval Meetings

I never liked more than six or seven weeks to go by without a face-to-face meeting with each advisee, so I always had a list of my advisees and the dates of our meetings handy. If nothing came up, I would schedule a short meeting—perhaps 15 minutes—to review what was going on with a student. Many of these meetings led to excellent discussions, and they reinforced the point with advisees that I was serious about keeping up with their school lives.

## Information-Sharing Meetings

These types of meetings are best held after advisors have met with staff and engaged in the information-gathering process, and before they have provided complete information to parents during a parent conference. Raising one or two issues right after learning about it in information gathering is appropriate: "Linda, Mr. Smith said to remind you that you owe five labs in earth science class. I'll ask you in a couple of days if there's any problem getting them in." Advisors should be selective in choosing a few areas they think would be best for an advisee to hear right away, rather than drowning a student in information—unless it's lots and lots of compliments.

* * *

I don't want to give the impression that issues come up continually and that advisory work inundates every advisor. Days or weeks go by when nothing urgent comes up. Most meetings are scheduled, not shoehorned into an already busy day. Of course, advisory work is like the rest of life: not much on Monday, Tuesday, or Wednesday, and then three kids need meetings on Thursday.

# What Does an Advisor Do in Group Meetings?

In many schools, the only group meetings for advisories are in the morning. All other meetings are between an advisor and an advisee. Other schools schedule special group meetings.

## Daily Morning Meetings

The routines associated with the daily group advisory meeting vary from school to school, but such items as attendance, announcements, and the pledge of allegiance are fairly common. In some schools, the pledge is said individually and in others, it is said over the PA system; in some schools, announcements are read from a memo, and in others, they are read over the PA system. However these routines are done, an advisor and advisees will have several minutes to talk.

I recommend having a policy that all advisors agree to be in the place where they meet students 5 to 10 minutes before advisory begins. This arrangement allows students to come in early and talk to their advisor or other students in a relaxed atmosphere. After a few months of meeting students, hearing from teachers, running into students informally in the building, and meeting with parents, advisors begin to have a deep and easy professional relationship with their advisees. It becomes natural to notice that Mary or John is wearing a special outfit or is upset. An advisor may say, "John, let's talk for a minute right after advisory," if the advisor senses that something is wrong. It may be natural to ask, "Mary, did you get to your English paper last night—the one we talked about a few days ago?"

Advisors begin to notice by October or November that nice things are happening among the students as a result of meeting in a relatively small group each morning. And when students continue in the same advisory after the first year, the greetings in September are pleasant to watch. An advisory begins to see itself as a group with a special bond. Some students will enjoy arriving early; others will come at the last minute.

The morning advisory is also the logical place to make appointments to see John at 3rd period on Thursday or Mary right after school next Tuesday. As already stated in Chapter 2, advisors can use any of their nonassigned periods for a meeting or can meet with a student before or after school and compensate by not working during a nonassigned period. Advisors usually meet with students during a student's lunch period, free period, before or after school, or as a last resort, during a student's class period (with the classroom teacher's approval). When students have a full schedule, making appointments may take time, but I've never had a situation where a meeting couldn't be arranged.

## Special Meetings

Some schools supplement daily morning meetings with meetings that meet special needs.

• ***Extended advisory meetings.*** Occasions may arise when advisories meet in the morning for an additional 10 to 20 minutes. Because of the problems in changing a daily school schedule, extended meetings usually occur only three or four times a year. Perhaps a tragedy occurred in a school the day before, and this meeting is part of what the school is providing to allow students to talk about their feelings. Some schools add time to advisories the first day of course selection to give advisors time to go over all the forms with students and to arrange for individual meetings. Each school should decide in advance which meetings need to be extended; extensions for special circumstances can be arranged on an emergency basis.

Extended meetings are a way to ensure that all students get a message, help, or an opportunity to talk to someone they have come to understand is the logical person to provide the information they need. Schools should not overdo extending advisory time, though, because subject teachers may, justifiably, become upset.

• ***Scheduled meetings.*** Some schools, particularly middle schools, schedule several 30-minute advisory meetings for special events. These times may be used to discuss community service or other special features of a school. They offer opportunities to plan an event, collect materials, or make arrangements—whatever needs to be done. In some schools, advisories take one or two field trips each year, and special meetings are held to discuss options and make plans.

• ***Partial day meetings.*** In rare instances, schools schedule a long block of time, perhaps half a school day, two or three times each year for advisory events such as a field day or community service—some event that an advisory has devised and had approved as a worthwhile activity for school time. For example, an advisory may arrange for parents to drive students to a nearby nursing home before a major holiday to do activities with the residents. Or advisories may work out an approved activity that will occur on December 18.

• ***Parent meetings.*** Group meetings of parents are uncommon, but very effective if they can be held. One type can provide orientation

to an advisory system. This meeting usually occurs in the first year of advisory work and serves to acquaint parents with the system as well as to set up a phone chain for advisory information. A second type of meeting can help parents understand certain information or a new program, for example, a school is starting a block schedule or an advisory system is entering a yearlong effort to keep clean a portion of the school grounds. A third type can be held by the parents themselves. They take turns hosting meetings to discuss school issues, and may occasionally request that an administrator, teacher, or advisor attend.

I have used the word *approved* a few times. Any activities advisors do during school time should have a civic or curricular element in them. Some advisories, if advisors are willing, get together outside of school hours to do something that is purely fun, but no advisor should plan activities that invite criticism that an in-school activity is unrelated to school.

# 5 Communicating with Parents

## What Is Information Gathering?

Information gathering (IG) is a method advisors use to get information they need to meet with parents. The method is based on two assumptions. First, an advisor needs a great deal of information to have a productive 30- to 45-minute meeting with parents; second, a school or district has ways for the faculty to meet two to four times to collect this information for each parent conference day.

Secondary school parents miss the connection they had with elementary school teachers. In middle school and high school, parent conferences establish a new type of connection by providing regular contact with parents. During information-gathering sessions, advisors gain information about students and share it with parents at conference time. Parents then feel more a part of their student's school life, making it easier for them to come to school for other tasks and functions. Of course, the most important focus is on students, but inviting parents to conferences to give them a comprehensive picture of their youngster shows up later in everything from volunteerism to yes votes on a budget.

Once again, advisor training is emphasized. A 6th grader just starting middle school may expect her parents to be included in much that goes on in school. An 11th grader may have different ideas, and the tone and content of the session with parents may shift more toward career choices or college visits. Advisors need to discuss and practice parent sessions and may want to contact an experienced advisor from another school to help them.

## When to Gather Information

Some schools use one or two faculty meetings to conduct IG sessions. Many schools can arrange for an early dismissal one day, giving staff an additional hour or two for work in this area. Sometimes teachers' associations give up one meeting to indicate their commitment to advisory work. It is best to have information-gathering meetings close together. Here is a schedule that shows four meetings, the optimum number to have for information gathering.

| | | |
|---|---|---|
| Wednesday | 2:30–4:15 p.m. | IG meeting in lieu of a faculty meeting. |
| Thursday | 12:30–2:30 p.m. | IG meeting. School has early dismissal at 12:30 p.m. |
| Monday | 2:30–4:15 p.m. | IG meeting in lieu of a faculty meeting. |
| Wednesday | 2:30–4:15 p.m. | IG meeting in lieu of a teachers' association meeting. The meeting should be designated for information gathering. |
| Thursday | | Regularly scheduled annual or biannual all-day meetings with parents. |

All staff should attend every IG meeting. The dates of these meetings should be posted well in advance, so coaches, play directors, and others can make every effort to attend. It is quite disheartening when most staff members are working hard to get the needed information at IG meetings and three people an advisor needs to talk to are not present. Schools need to work out a satisfactory and legal method with staff, administrators, and union or association representatives to handle staff who miss meetings. One person, probably an administrator, should be responsible for posting a list of staff members who will be out sick or unable to attend an IG meeting.

A decision needs to be made about what time of year to hold IG meetings—assuming schools have some choice. In general, such meetings should occur just before parent conferences. If a school has some choice about when to hold parent meetings, the following questions are worth debating:

• Should a parent conference be held immediately after grades are known?

• How far into the year should the first meeting with parents be held? How much time should elapse between meetings if there are two or more?

• Do advisors want their meeting with parents to be about grades?

• How much time do advisors need in a new school year before they are comfortable giving information?

• When should the second meeting be held? Usually, advisors want it early enough in the spring so parents can work with their youngsters on problems.

## Preparing for an Information-Gathering Meeting

A large, comfortable room such as a school library or cafeteria is needed for the meeting. Advisors meet in pairs, and the pace is slightly frantic—so refreshments are much appreciated.

Advisors bring a form for each student and a list to the meeting. A typical form is shown in Figure 5.1 (see p. 41), Standard Form for the Information-Gathering Process, although many advisors prefer to make up their own to suit their needs. Advisors who use the form may want students to fill out part of it in a morning group advisory. The names of an advisee's teachers and the title of each class need to be listed. Because high school classes often have several options within a subject area, the correct class title is especially important. To prepare for the meeting, advisors put the neatly filled out forms in alphabetical order by student name.

Some advisors use the comments sections to note patterns, such as "usually does homework, but not in math" or "seems to have problems remembering to bring books to class" or "for the past two weeks appears to be fatigued." Other advisors like to organize the form by period, block, or module so they can see time patterns. Advisors can also create forms that are more specific. Here is how one person had each subject entry:

Math _____ Teacher _____

Possible Grade _____

Homework _____

Classwork _____

Special Recognition or Problems

_____

_____

Other _____

The list that advisors bring to the meeting contains the names of all the people advisors need to speak to. Obviously, advisors need to speak to their advisees' teachers and sometimes to an administrator, nurse, social worker, or some other staff member. In a senior high school, it is not unusual for advisors to speak to 20 or more staff members to get information on all their advisees. Schools that team-teach find this task a bit easier because advisors do not need to speak to as many people.

I always found it helpful to write the names (last, first) of all my students on an index card, sheet of paper, or the outside of a manila folder containing the information-gathering forms. I knew I was looking for Mr. Smith, and I could ask, "Which of these students do you have?"

The same preparation applies for giving information. All subject teachers should come to the session with grade books and any other easily carried information that advisors may ask for. Some teachers use page-size forms rather than grade books, especially in schools where portfolios are common. Subject teachers should be relaxed about this meeting. After the eighth or ninth week of school, I found that a grade book and memory were enough for any teacher to give me excellent detailed information.

## Questions to Ask at the Meeting

Most questions advisors ask are obvious; however, a list helps serve as a reminder. Time usually permits advisors to ask each staff member three or four questions. Advisors can select from a prepared list or make up questions pertinent to a school's or student's circumstances.

Form 5.1

**Standard Form for the Information-Gathering Process**

**Who Completes Form:** Advisee and advisor
**When and Why:** In a morning group advisory, each advisee fills in name and classes; at an information-gathering meeting, the advisor fills in the remaining areas; To gather information for a parent conference
**Who Uses Form:** Advisor

Name of Advisor _____
Name of Student _____ Fall _____ Spring _____

1. English _____ Teacher _____ Possible Grade _____
Comments _____
_____
_____

2. Social Studies _____ Teacher _____ Possible Grade _____
Comments _____
_____
_____

3. Science _____ Teacher _____ Possible Grade _____
Comments _____
_____
_____

4. Math _____ Teacher _____ Possible Grade _____
Comments _____
_____
_____

5. Foreign Language _____ Teacher _____ Possible Grade _____
Comments _____
_____
_____

(Figure continues on the following page.)

**Figure 5.1**

(continued)

6. Elective _____ Teacher _____ Possible Grade _____
Comments _____

_____

_____

7. Elective _____ Teacher _____ Possible Grade _____
Comments _____

_____

_____

Overall Comments

_____

_____

The first question should be open-ended and general, and the answer may cover several questions. Advisors can then follow up with more focused questions, perhaps about number or letter grades, cooperative work, portfolios, exhibitions, community service, or areas that represent a school's program and culture. Here is a list of the types of questions advisors ask:

- How is Johnny doing in your class?
- What sort of grades or credit is Mary getting?
- Is Johnny properly placed in your class? If not, what would you suggest?
- In which third of the class would you place Mary?
- Can you give me one or two examples of something Johnny does well?
- Can you give me one or two examples of something Mary has difficulty doing?
- Does Johnny work well in groups? What role does he usually play in a group?
- Is there a particular piece of work that Mary has done that I should know about and discuss with her parents?

- What can you tell me about Johnny's work habits—organization, reliability, and so on?
- Does Mary have any behavior problems?
- Is there anything you'd like to add?
- Is there anything you want me to say to Johnny's parents?
- Is there anything you want me to ask Mary's parents?

## Meeting Movement and Time

Most advisors begin looking for people to question as soon as they enter the room. Until a staff becomes accustomed to the information-gathering method, the pace can be somewhat challenging. Advisors are worried that they won't get all the information they need, and they are frustrated when someone sits down with them to ask about seven or eight students just when they are about to approach another person to get information. Advisors become especially frustrated when they have not yet gathered a lot of information and one or two "takers only" approach them. These are typically advisors such as the principal or librarian who have no classes and little information to give in return.

There is no easy solution here. Advisors need to get used to gathering the information they need on a student in two or three minutes. Some socializing occurs, and occasionally, an advisor needs to stretch, leave the room for a few minutes, or get refreshments. After staff members have gone through this process once or twice, they will change it to suit their circumstances. Advisory Committee members are also experiencing the process and will quickly see where modifications are needed.

These meetings should not be too carefully regimented. Using separate sections of the room for each subject breaks down the process. Advisors go to any person who is free rather than wait nine minutes for the math teacher to become available. Advisors' movements around the room and time needed to gather information from each advisor are enhanced by the degree to which they are prepared.

The information-gathering sessions constitute a great deal of staff work and time. I and every other staff member always grumbled about how hard this effort was, but we also agreed that at the end of the meetings, we had an extraordinary amount of useful information about each student in our advisories.



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The process also has an unexpected benefit for staff. Participants learn about each others' styles of work, priorities, and educational values. By listening to colleagues' talk about students that advisors know well, advisors see how teachers operate with middle and high school students. For me, such interaction was always a great learning experience, and sometimes I changed my views or behavior as a result of what I learned.

## Modifications

Ideally, schools should have four information-gathering meetings to prepare for each parent conference day. Here are suggestions about what to do if four sessions are not possible.

- ***Meet fewer times.*** Not every school is able or willing to arrange for four meetings or to have one early dismissal. If advisors meet two or three times, the job is somewhat harder, but it can be done. The Advisory Committee needs to develop a form that captures the basic questions advisors need answered, yet can be adapted to each advisor's needs. Everyone—advisors, parents, and students—should know that the areas covered will be fewer.
- ***Use forms and one or two meetings.*** If advisors can only meet once or twice as a staff to gather information, the process can be speeded up by asking people to complete a short form. An example is the Short Form for the Information-Gathering Process (Figure 5.2). The words *short* and *informative* have different meanings in different schools. One middle school organized around teams may have most teachers seeing no more than 80 students each day and advisories that average 12 to 13 students. Another school may have teachers seeing 130 students each day and advisories averaging 16 students. Each school must devise a form that addresses issues and information required in that particular setting.

Advisors always have the option of seeking out the person who completed the form. Even if a school can only have one meeting, receiving these forms from the art, physical education, English, social studies, Spanish, math, and science teachers, as well as perhaps the dean, nurse, or assistant principal, gives an advisor a fairly good picture of how a student is doing.

Form 5.2

**Short Form for the Information-Gathering Process**

**Who Completes Form:** Any school employee
**When and Why:** Before a parent conference, to gather information for a parent conference when there is not enough time for advisors and staff to meet
**Who Uses Form:** Advisor

Name of Advisor _____
Name of Student _____ Date _____
Name of Person Completing the Form _____
Subject/Area _____

Grades or Summary of Work

_____
_____

Latest Exhibition Completed and Brief Evaluation

_____
_____

Check and Comment on One

_____ Behavior _____ Homework _____ Creativity
_____ Work in Class _____ Reliability _____ Work in Group

Comment

_____
_____

____ Advisor Needs to See Me
____ Advisor Needs to See Me If Possible
____ Advisor Does Not Need to See Me

• ***Use forms almost exclusively.*** If a school can provide little staff time to exchange information, using only forms and holding no meetings are reasonable alternatives. Such modifications are better than using a system that does not allow staff members to develop a comprehensive knowledge of each student. When no meetings occur, the loss of

course, is the advisor's ability to hear the tone of the interlocutor's voice, ask follow-up questions, and learn something unexpected. Also, often for good reason, staff members are sometimes uncomfortable putting some information in writing.

If a staff must use forms as the (almost) exclusive method of gathering information, the Advisory Committee should create a form that reflects a school's particular culture. A *one-page* form that combines a checklist with short narrative sections works well. If the form is more than one page or if the narrative sections demand much detail, some people won't complete it. If forms are the primary method of communication, some teachers may have to complete 100 or more, so the process must go fast or the system will break down.

## Should Advisors Share Information from the Information-Gathering Process with Advisees?

Yes, absolutely! Sharing the information gathered from staff with students is usually one of the best meetings between advisors and advisees. Students should meet with advisors as soon after IG meetings as possible. Some schools invite students to parent conferences, but many students prefer not to come because they'd rather enjoy the day off or prefer not to come with parents.

During the IG meetings, advisors are often frank with one another, and it is not unusual to hear, "Look, this is just for you. Don't repeat it to the student or parent," or, "Don't write this down, but just between us, I think Joe is doing some drinking or drugs or his parents are separated." Obviously, advisors do not share this type of information with students, but they do try to see patterns or issues that stand out so that they can discuss them with parents if appropriate.

When advisors meet with students to give them a summary of what the advisors have learned, advisors should pay special attention to those issues that they think they can help with. If Mary is doing reasonably well except with homework, then homework is an issue to discuss. What's the problem? How can her advisor help? Mary's advisor can ask Mary if she has a place in her notebook to write down daily homework. Does she have a room or some other place where she can

do homework? Can she use the school or local library? Is she overextended or not good at organizing her time? Is the problem more with long-term or short-term homework assignments? She can do the 10 math problems but can't organize the paper due in two weeks in her humanities class. These are areas where a knowledgeable advisor can help.

There is debate about who should hear the information first, students or parents. In most cases, parents hear first because advisors meet with them on the day right after an IG meeting. I think giving the most complete information to parents first is better. If students are given a full report, they may go home, say some of what they've heard, and tell the parents there is no point in their going to see the advisor. Giving students selective information before a parent conference is appropriate: "John, let's talk about your math class. You seem to be doing well everywhere but there. Mr. Block says you're bright and capable and you do very well in class, but your homework and tests are not good. Can we get together today or tomorrow to talk about this? I know you have a big test coming up in a few days."

## What Happens at Parent Conferences?

Every form of communication with parents improves under an advisory system. Such improvement is a natural outcome of information gathered by an advisor and the complete, nuanced picture an advisor is able to form of a student. Parent conferences typically occur annually or biannually.

### Parent Conferences Based on Full Information Gathering

At the conclusion of the four IG meetings, an advisor has a full page or more of notes for each student and a recent memory of conversation with all an advisee's teachers and other significant adults in the advisee's school life. Some advisors highlight words or phrases in their notes, others write a precis of the notes or list patterns and highlights. Much depends on what an advisor has learned, what an advisor is comfortable doing, and what parents' expectations are—if parents have expressed any. An advisor must also be guided in part by the length of a

parent conference. 40 minutes allows for a different sort of conversation and report than 15 or 20 minutes.

When no special issue is apparent, an advisor may simply give parents a brief report on each class or activity, perhaps in the order in which the classes occur during the student's school day. Advisors usually summarize in some fashion, perhaps by noticing any consistency among reports or beginning with the better reports from, say, the math and science teachers, as opposed to reports from the humanities teachers about being late to two classes.

An advisor certainly focuses on specific issues that exist. If a student has suddenly taken a nose-dive in art and social studies, has become inexplicably remiss in preparing for band rehearsal, or seems to several teachers to be unusually fatigued and unable to take part in group work, discussion of this concern may occupy a good part of the conference. The advisor may not have written every controversial item down, but may wish to say that several teachers have noticed that Beth often seems fatigued or "out of it." Can the parent supply any helpful information? How is Beth at home? Is she feeling well? Is she on any medication?

Some schools suggest that parents come in with information they want to share with an advisor or questions they wish to have answered. I have experimented with sending a brief note to parents a couple of weeks before a parent conference and before an IG meeting to query parents about questions they would like me to answer. A minority of parents responded, and we had a better meeting when I addressed their questions.

Many advisors ask parents at the outset if the parents have any information they wish to share. An advisor's perception of what is happening with a student may change when the advisor learns that parents are divorcing, a student's favorite aunt has cancer, or a student has been extremely lethargic at home, coming home tired and napping for two hours most afternoons. An advisory system promotes the exchange of this sort of helpful information.

Asking appropriate questions helps parents understand that an advisory system includes an exchange of information. Johnny's mother's income is none of an advisor's business, nor does Johnny's mother have the right to know about an advisor's personal business; however, an

advisor may raise such questions as the following if they seem appropriate and important.

- Is anything going on at home that would account for Johnny's anger in school?
- When does Mary do her homework? Have you considered working out a set time with her when she'll do her homework and not take telephone calls?
- Does Johnny have a place to do his work at home? Would it help if he stayed after school most days to use the library? Could you pick him up at 5 p.m.?
- I know Mary will be out of school for about five weeks after the surgery. Do you have any suggestions for how we should handle the homebound tutoring?
- I'm having a hard time getting Johnny to focus on college. How are you doing with this? Have you talked about visiting any colleges? Has he expressed interest in any particular schools?

## Parent Conferences Based on Partial Information Gathering

Even when information gathering is restricted to one or two sessions or when forms are primarily used instead of face-to-face meetings, a productive parent conference is still possible. Establishing a focus and informing parents of the nature of the meeting ahead of time are key.

Let's assume that only one IG meeting is possible and that teachers have limited time to complete and exchange forms. Parents should know in advance that the conference will include a short sketch of their student's school experience and a focus on one or two items. Mary is having great difficulty completing homework in three subjects. Johnny is improving in math and English, but his work is deteriorating in social studies, art, and science. Mary is still coming to school late at least twice each week, and she's frequently late for classes. Johnny is disrupting his classes by calling out or making offensive noises. Other topics advisors may concentrate on include college choices, ways to encourage a capable student to raise *B*s to *A*s, or simply good news.

A description of the limits of a conference can be transmitted to parents through a phone call setting up the meeting, a newsletter, a flyer that the student takes home, or a combination of ways—the more forums the better. For most school districts, parent meetings of any sort with an advisor are a great improvement over the past system, which usually held no meetings or an occasional meeting with a subject teacher or administrator to discuss bad news. Before advisories, no staff member in a school had a solid, comprehensive picture of a student.

## Scheduling Appointments with Parents

A method for setting up appointments needs to be settled before the time arrives to actually make appointments. Let's assume a day has been scheduled for teachers and parents to meet. The hope is that all parents will come to the school, so appointments are scheduled every 20 or 30 minutes—depending on the size of the advisories. Who makes the appointments? Here are four options:

- Advisors call parents to schedule the appointments. Advantages are that the call personalizes the contact, and each advisor has only 12 to 17 calls to make.
- One or two secretaries or aides schedule the appointments. This approach works well, but it ties up a couple of telephone lines for two or three days so several hundred calls can be made.
- Parents contact a school during a three-day period to schedule an appointment. Again, two staff members and two phone lines are tied up for two or three days. A variation on this approach is for advisors to contact parents who do not call for an appointment or who cannot come during the available time slots. Sometimes an advisor can open up another time, and sometimes the report must be given over the telephone.
- Advisors or other staff members assign times to parents and ask them to phone the school if they cannot come during the assigned times. Parents need to understand that a particular day has been set aside for conferences, that many time slots need to be assigned or filled, and that rescheduling is not usually possible. If an individual advisor, however, wishes to make times available before or after school on certain days, that information should be given to the person handling the calls.

Figure 5.3 (see p. 52), Form for Scheduling Parent Conferences, can be used or adapted to suit a school's needs. All parents should be encouraged to come in; unfortunately, some parents—particularly of older students—will not come in no matter how much they are encouraged.

## Telephone Conferences

About 25 years ago, when I first began to investigate advisories, I came across a school district in Virginia that was unable to arrange parent meetings. Instead, they worked out with their teachers a method for telephone conferences. Parents knew that on certain dates, they should keep their phone line free for a couple of hours because an advisor would be phoning them to give a report and discuss their youngster. Parents wanted to hear from an advisor and appreciated the effort advisors made to call them in the evenings.

School staff and parents knew that there were two reports each year and that all telephone conferences would be made during a two-week period. Mary's parents knew they would be called either on Monday or Tuesday evening between 6:30 and 8:30 p.m. Teachers received a small payment for the expense and time spent making these calls. Setting up telephone conferences requires a system to notify parents about when to expect a call and about how to contact parents with non-standard schedules.

This method is far from ideal, but it indicates that ways do exist to handle communication, even under somewhat adverse conditions. The teachers understood that parents wanted a reasonably comprehensive picture of their student—and the teachers wanted the school to have contact with parents—but their teachers' contract was such that finding a satisfactory method was difficult. By looking carefully at the contract and generously interpreting a few clauses, the teachers' association and administration found a method that all parties agreed might work.

## Parent Workshop and Advisory Newsletter

Many secondary schools have a Back-to-School Night or are willing to schedule an evening when parents can become acquainted with an advisory system. This orientation is especially important for parents whose first child is entering the system. The Advisory Committee may

FIGURE 5.3

## Form for Scheduling Parent Conferences

**Who Completes Form:** Person scheduling conference times
**When and Why:** During calls to parents and guardians, to make a schedule of conference times for an advisor
**Who Uses Form:** Advisor

Name of Advisor _____ Fall _____ Spring _____

Date of Conference Day _____

| Time | Name of Parent or Guardian | Name of Student |
|---|---|---|
| 7:00 a.m. | Advisor is not available | |
| 7:30 | | |
| 8:00 | | |
| 8:30 | | |
| 9:00 | Advisor needs to keep open for guidance meeting | |
| 9:30 | | |
| 10:00 | | |
| 10:30 | | |
| 11:00 | | |
| 11:30 | | |
| 12:00 | Advisor needs to keep open for department lunch | |
| 12:30 p.m. | | |
| 1:00 | | |
| 1:30 | | |
| 2:00 | | |
| 2:30 | | |
| 3:00 | | |
| 3:00 | [Day after conference day. Advisor is available if necessary.] | |
| 3:00 | [Two days after conference day. Advisor is available if necessary.] | |

*Note:* The advisor is not available at 7 a.m., has kept two slots open for other commitments, and is willing to meet parents after school on two other days. These two days should be close to the conference day so that the news is not stale by the time of the meeting.

wish to set up this meeting, which often includes 10 to 12 advisors, students, and role playing. The workshop is a school's effort to provide all the information parents should have about a system that probably was not in place when they went to school.

A short newsletter describing a school's advisory system and listing a calendar of events for the current school year is another way to educate parents. Each year a basic description of the school's advisory system should be repeated, along with parent-teacher conference dates and any other dates that are related to advisory work. In addition, parents should be informed of some of the workings of the advisory system or changes that have been made. For example, a two-paragraph description of information gathering will impress most parents with the amount of planning and work that goes into this effort.

# 6 Special Issues

## What Is the Role of Guidance Counselors?

At first, many guidance counselors do not realize that an advisory system enhances their role, and instead perceive that this system is an effort to replace them or at least reduce their numbers. I have never heard of a school where a guidance counselor has been eliminated as a result of an advisory system. In fact, such a system clarifies how important counselors' work is and how counselors' skills can best be used.

Guidance counselors typically have a counselor-student ratio from 1:125 to 1:350. Thus, even under the best of circumstances, guidance counselors are not able to spend much time with any one student. Because advisors meet with students and handle many school problems that previously found their way to counselors, counselors have more time to spend on their tasks. This section describes counselors' work in schools with an advisory system.

### Counseling

Guidance counselors meet with students to help with those problems or issues beyond advisors' expertise. From family problems to substance abuse, from sexuality to serious issues related to school programs, counselors can spend extended time discussing with students the school implications of issues that are bothering students, as well as make recommendations for how students may get help with issues that go beyond what counselors can or should do.

### Career and College

Counselors follow up on the basic work that advisors start. Counselors come into the conversation after a student has eliminated several career paths or chosen six or eight colleges. If possible, a student's advisor attends the first career or college counseling session between a student and counselor.

### Program Planning

Counselors have time to meet individually or with several students in an advisory to sketch out a possible program for middle school or high school. Advisors usually attend these sessions, which familiarize both advisors and students with program choices. Such meetings start everyone thinking about the future and lay the groundwork for actual course selection. To help students and advisors understand the process, counselors usually have informational forms specifying state and school requirements.

### Selecting Courses

In many schools, advisors meet with students to select classes for the next year. To train advisors for the task, counselors hold workshops and create forms to help advisors understand what courses and sequences are required and where students have considerable choice. Such collaborative work, which often occurs at faculty meetings, develops positive relationships among staff members.

At first, course selection seems a daunting task for noncounselors. But advisors soon learn that most students take a prescribed sequence, that most variations are fairly standard, and that when the choices are complex, counselors are available to assist.

## Is Helping Students Select Courses Difficult?

Selecting courses is not difficult, provided some preliminary steps have been taken. Most advisors need reassurance that advisors throughout the United States have done this task and have found it's not overwhelming. Rather, such work is logical and satisfying for advisors, who are the most qualified people to help their advisees choose courses suited to individual needs and programs. Here are three guidelines.

- Guidance counselors and administrators should meet to create the necessary materials and forms for advisors. Materials specific to a school are needed because state and school requirements are slightly different, making a universal national packet impractical.
- Before course selection takes place, individual and group meetings for advisors should be held at each grade level to get advisors thinking about possible schedules and familiarize them with terminology.
- Advisors should help students choose courses, not schedule class periods. Computers make scheduling relatively easy. Complications arise when there are choices, which become the basis for a good discussion between advisors and advisees. Class scheduling and course conflicts are usually resolved by a computer—or in the case of an extremely difficult problem, by a guidance counselor.

For many students, course selection for a particular year is fairly standard: English, social studies, math, science, foreign language, art, and physical education. Discussion occurs when choices are offered. For example, to satisfy an art requirement in 8th grade, a student may take media, home economics, or drawing; to satisfy an English requirement in 10th grade, a student may choose English Literature, English Literature/Composition, or Readings in Great English Novels. A student and advisor read the course descriptions and decide what may be best for that student.

Advisors usually have a three-week block of time to help students select courses, so time is available to ask counselors and others questions. If an advisor or student has second thoughts about a course, a change can be made—although the number and types of changes should be minimized. Advisors have found that after they've gone through the course selection process once with their advisees, it's fairly easy to do in future years.

Sequences have some importance in middle school and far more in high school where graduation may be at stake. Most sequences or sequence choices are easy to follow, and for most students, the sequences that interest them are clear to advisors and students. Today's students, appropriately, are directed toward the most demanding program they can achieve, but even for those heading for college, more than one

sequence may be available, depending on individual interests and inclinations. Some schools and states allow students to take three years of a foreign language, three years of technology courses, or three years of advanced art courses to satisfy a particular requirement. Most of these possibilities are listed on a schedule sheet, reducing the likelihood of errors.

What is the first step in selecting courses? A student and advisor meet. Prior to the meeting, the student had been given material to take home and discuss with her family. In addition, earlier in the year, all advisors had a group meeting with a counselor, who explained the sequences available to students in that school. Quite possibly, the advisor has had a brief discussion or two with the advisee about future plans.

For the meeting, the advisor has several helpful documents, including a computer form with the advisee's name, address, ID number, and places to enter choices. When no choices are available, the computer has entered all the course information. The advisor also has a course description booklet, a one- to two-page listing of all courses, and most important, an extensive knowledge of the student. Some guidance counselors also provide an information sheet listing do's and don't's of the process, a list of commonly asked questions, and their answers.

After the advisor and student have made decisions and the computer form is completed, the student takes the form home for a parent or guardian to review and sign. The advisor has indicated those courses the student must have, those the student wants to have, and perhaps one course that is discretionary but would be nice if it could be scheduled. A guidance counselor is usually willing to review one or two forms if an advisor is unsure of some information. The class scheduler sees it next, and obvious errors show up immediately. Most advisors get used to this system quickly, and course selection turns out to be more accurate and more personally suited to students.

## What Role Does an Advisor Play in Discipline?

An advisor is a student's advocate. What does such work mean? First, an advisor does not need to be involved with every small infraction that occurs. Teachers and others, however, should notify an advi-

sor of patterns of problem behavior or any major incident. If Johnny has been late to class three or four times in the past two weeks, with flimsy excuses, his advisor should be notified. If Mary had a shouting match with another girl, which nearly became a fight, her advisor should be told what happened.

Each school has its own routines for discipline, and the attitude toward discipline may vary from rather flexible to quite rigid. When a problem occurs, an advisor's job is to talk to the student about the problem and work with the student to figure out what is going on and what may help. The advisor may sometimes wish to speak with other people who are involved and even to the student's parents; everything should be done with the student's knowledge, if possible.

Second, an advisor does not mete out punishment; that work is someone else's responsibility. Such a differentiation keeps the lines of communication clear and allows advisees to confide in their advisor. In the early days of my experience, I felt that advisors should discipline students. My argument was that an advisor acts in loco parentis, that the student would understand discipline coming from an adult with whom he had a strong relationship, and that an advisor would best understand which punishment would be beneficial. For example, one student may require conversation that leads to making restitution for breaking a tape player or compensatory work for defacing lockers; another student may need suspension as a time to think about what happened and as an clear indication of a school's seriousness about not tolerating dangerous or difficult behavior.

I was wrong. Discipline kept getting in the way of every other relationship an advisor wanted to have with an advisee. Frequently, a student felt that her advisor should be lenient—otherwise, what was the point of having this adult "friend"? I also learned that most adults in a school wanted little to do with discipline, particularly harsh discipline, and happily pushed everything over to advisors. Discipline reflects the culture of a school and a community, and an advisory system is not intended as an attack on that culture. In schools with an advisory system, most staff members believe that discipline improves because of the system, which counters anonymity and gives each student an adult confidant. In addition to going through whatever discipline process exists

in a school, a student has an advisor who listens to him, perhaps speaks to a teacher, parents, or the principal about what happened, and tries to see that any punishment is fair.

A minority opinion about discipline exists, especially in middle schools. Some advisors believe they should play a direct role in discipline. This topic should be carefully discussed by the Advisory Committee and perhaps at a faculty meeting. The Advisory Committee should make the decision, and it should be binding on all advisors. Serious problems arise when one advisor metes out discipline and another does not—students are sure to compare. In most cases where advisors play a role in punishment, relatively light problems are involved.

Third, an advisor's advocate role is especially important to students when a serious incident occurs. Mary has defied Mr. Smith in class, using abusive language and causing Mr. Smith much distress and humiliation. Mr. Smith is livid and recommends harsh disciplinary measures to the assistant principal. The assistant principal's first impulse, after hearing from both Mr. Smith and Mary, is to do all that Mr. Smith has recommended. She decides, however, not to act so quickly and to use the advisory system before calling Mary's parents and recommending to the principal a five-day suspension and an apology in front of the class when Mary returns to school.

The assistant principal notifies Mary's advisor about this incident using a notification form (see Figure 1.1), and sending it directly to the advisor's room. The advisor asks if Mary may stay in his class for next period until he has had a chance to talk to her during his prep time. The advisor agrees to take responsibility for Mary and to bring her to the assistant principal's office during his prep time. Everyone has a chance to calm down. Mary has an opportunity to talk to her advisor, and the advisor, whom knows Mary well, is in a good position to play the role of advocate.

Mary confirms that the teacher was blameless. She tells her advisor that when the assistant principal questioned her, she accepted all the blame and did little to defend herself. The advisor also learns that Mary had broken up with her boyfriend the period before that class, so that a normal and mild criticism from the teacher about her homework set her off. Mary and her advisor talk the situation over. Mary rarely has dis-

cipline problems, has never had a serious problem with this particular teacher and, in fact, respects him and enjoys his class. She is doing reasonably well in school and in this teacher's class.

Mary and her advisor agree to go to the assistant principal with all the facts and to ask for a somewhat different punishment from the one the assistant principal and teacher had worked out. They request that Mary be allowed to write a letter, which the teacher will read to the class the next day. In it, Mary will take responsibility for her actions, explaining that she was extremely upset when she came to class (but not state over what), and she will apologize for any distress she may have caused the teacher and the class. She will also ask the assistant principal to reduce her suspension to one day.

After Mary and her advisor discuss the situation with the assistant principal and the teacher, the letter is accepted, but the suspension will last two days. Mary agrees to talk with her advisor about what she might have done with her anger and what other options she had. Her advisor agrees to call her the next day when she is at home. The teacher agrees to say a few words to the class about Mary's maturity in accepting responsibility and writing the letter. He also wants the class to know that he is sympathetic to Mary—but that students need to control strong emotions they bring to class or seek out an appropriate adult for help, instead of coming to class on that rare occasion when they fear losing control.

The preceding example is intended to show how an advisor can be a student's advocate, although the ending may not always work out as well or easily. In a slightly different scenario, let's say the advisor thinks the punishment is correct. The advisor's role now is one of talking to Mary about what happened and about how best to use the five days out of school. I realize that this incident made a considerable demand on the advisor's time. It cannot be said often enough, an advisor's role is whatever that advisor finds acceptable. And most of the time, advisors want their role to be strong and helpful.

Finally, no one should despair because a teacher or administrator forgets to notify an advisor of something or because the recommendation of an advisor, or student and advisor, is not accepted. No school is going to give an advisor veto power, but an advisory system does en-

sure that an advisor's point of view is heard. Everyone who works in a school knows that discipline is muddy water, that tempers often flare, that consistency is difficult and sometimes inappropriate, and that loose ends abound. Although an advisory system makes discipline a bit more time consuming, such a system is consoling for students and parents and satisfying for advisors who often are able to resolve problems in ways that other staff members cannot.

## What Should an Advisor Do If the Advisor Thinks She's Getting in over Her Head with a Student?

Advisors should learn in training that their role is not intended to replace guidance counselors, parents, social workers, school nurses, or psychologists. From a conflict or misunderstanding with a teacher, to practical advice on study skills, most issues students raise can best be resolved with the help of an advisor whom students trust. In some instances, however, an advisor may feel she's getting in over her head. A student may come to an advisor to discuss a problem at home, and it quickly becomes apparent that this issue is too serious for the advisor to take on. The advisor may need to refer the student to a guidance counselor or other professional.

Sometimes students come to an advisor with issues related to drugs, suicide, sexual adjustment, or other problems that are beyond an advisor's competence or comfort zone. An advisor's job here is to listen to the student and figure out the next step. The advisor may say to the student, "This is a serious problem. Give me a day or two to think about what we might do." Obviously, if the problem is urgent, the advisor needs to seek help more quickly.

The vast majority of problems young people bring to an advisor can be solved without outside help. But the moment an advisor feels that the issue is beyond her qualifications or comfort level, the advisor needs to talk to the assistant principal, nurse, guidance counselor, or other professional who can help with the next step. With most issues students bring to an advisor, the advisor can maintain confidentiality or use good judgment about what to do. But at times, an advisor may simply have to

take action and violate all trust. The most obvious case is a suicide threat. If an upset student says to her advisor that she often thinks of "ending it all" and has been gathering pills to do so, the advisor should detain the student, immediately find an administrator or counselor, call her parents (or have an administrator call), and make sure the student is in good hands before leaving her. Most states mandate that a school staff member act in a particular way in the face of an impending emergency.

# Conclusion

An advisory system in any middle, junior high, or high school helps overcome the impersonality and alienation that secondary students often feel. Using staff as advisors guarantees that each student has an advocate who knows the student extremely well. At a time when families in the United States are often fragile or broken, the advisory process also gives the significant family members in a student's life a central school person to whom the family can turn.

An advisory process is no panacea, but then there are no panaceas in an enterprise as human and complex as education. Many advisors say the system produces results such as less graffiti or less violence in a school. Others say that they find playing the advisor role satisfying, and that families appreciate a system so caring and convenient. I know of no controlled study documenting the effects of an advisory system. It is, after all, still fairly new except in a small number of schools that have had it for more than 10 years. But it is becoming more common, more needed, and more valued.

Those who know this process can say with certainty that an advisory system makes school a more personal place; gives all advisors a chance to share something powerful; provides students and parents a specific person in the school to whom they can turn with questions, concerns, or offers of help; and has a generally salutary effect on the overall culture of a school. The fact that every single student knows there is one person in a school building who is her advocate, one person a student can seek out to vent anger to or ask a question of, is com-

forting. As time goes by, an advisor becomes a combination mentor, advisor, and adult friend—but always a mature professional with a student's best interests in mind and an understanding of who that student is. An advisor, over two or three years, will have seen an advisee through 10 to 20 meetings, a few crises, several parent conferences, and a few unpredictable events—many happy, some sad. An advisory system gives each student the support young people crave and helps defeat an alienation from school that too many students feel in an educational bureaucracy.

# Appendix: Additional Help

## Publications

Few publications about advisory systems are available. Readers may find the following two helpful.

Goldberg, M. F. (1985). House group: a guidance role for the teacher. In G. Hass (Ed.), *Curriculum planning: a new approach*. Boston: Allyn and Bacon. This chapter provides a brief overall description of an advisory system and outlines three key roles of advisors.

Jenkins, J. M. (1992). *Advisement programs: a new look at an old practice*. Reston, VA: National Association of Secondary School Principals. This 34-page pamphlet contains excellent general guidelines for an advisement program and a list of seven schools with exemplary programs.

## Schools and People

I recommend visiting one or two schools that use an advisory system. School professionals can contact their state education departments or the National Association of Secondary School Principals (1904 Association Drive, Reston, VA 22091-1537 USA) to get the names and addresses of area schools using advisory programs.

Educators who wish to visit a school with a successful advisory program may also contact the following people:

Joseph Hayward, Principal
Shoreham-Wading River High School
Route 25A
Shoreham, NY 11786 USA

Gary Bell, Principal
The Albert G. Prodell Shoreham-Wading River Middle School
100 Randall Road
Shoreham, NY 11786-2536 USA

Elaine Boyrer, Principal
North Shore High School
450 Glen Cove Avenue
Glen Head, NY 11545 USA

## About ASCD

Founded in 1943, the Association for Supervision and Curriculum Development is a nonpartisan, nonprofit education association, with international headquarters in Alexandria, Virginia. ASCD's mission statement: *ASCD: a diverse, international community of educators, forging covenants in teaching and learning for the success of all learners.*

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ASCD provides many services to educators—prekindergarten through grade 12—as well as to others in the education community, including parents, school board members, administrators, and university professors and students. For further information, contact ASCD via telephone: 1-800-933-2723 or 703-549-9110; fax: 703-299-8631; or e-mail: member@ascd.org. Or write to ASCD, Information Services, 1250 N. Pitt St., Alexandria, VA 22314-1453 USA. You can find ASCD on the World Wide Web at http://www.ascd.org.

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Donald Young, Professor, Curriculum Research and Development Group, University of Hawaii, Honolulu, Hawaii

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How

# DESIGN AN ADVISORY SYSTEM FOR A SECONDARY SCHOOL

When Mark Goldberg first visited a school with an advisory system, he was impressed by the way such a system personalizes school for secondary students, provides a shared professional experience for the adults in a school, and improves home-school relations. He decided that if given the opportunity, he would bring an advisory program to a secondary school. Later, when he became founding administrator of a high school, he started an advisory system. This book is based on his experiences. Goldberg explains why an advisory system is important, what it requires, and how to tailor the concept to a particular school to provide an enriched experience for students, staff, and parents.

An advisory system stresses the advisor-advisee relationship and ensures that every student is known well by at least one adult in a school. That adult—a teacher, administrator, librarian, or other staff member—becomes the student's advocate and the first person the student seeks out to discuss school problems with or to get advice about where to turn for assistance with more serious issues. Such a relationship enhances the student's school life, from course selection to decisions about the future. This practical book provides a comprehensive look at a unique system for personalizing secondary school so students get the most out of their years in school and are better prepared for life after graduation.

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